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ABSTRACT

This product checklist, which is intended for businesspersons and/or labor representatives responsible for reviewing/selecting employee training materials, contains a series of questions to use in determining whether employee training products follow best practice and will meet the needs of specific firms and build the productive capacity of their employees. Section 1 explains the checklist's purpose, defines employee training, and presents an overview of the checklist's structure. Instructions for using the checklist are provided in section 2. The actual checklist, which is presented in section 3, includes an annotated listing of the key elements of each of the following steps in the development/implementation of employee training programs: program development, program preparation, curriculum development, instructional development, training staff preparation, program delivery, and training and program evaluation. A comparison chart that contains space to compare the merits of different training products is included in section 4. In section 5, employee training is discussed within the larger context of work force and workplace change, and other products designed to help small and midsized companies effect change through employee training programs are listed. Section 6 includes a list of individuals serving on the National Workforce Assistance Collaborative's board and advisory groups. (MN)

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EMPLOYEE TRAINING PRODUCT CHECKLIST

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Prepared by the National Alliance of Business

EMPLOYEE TRAINING PRODUCT CHECKLIST

by Terri Bergman

February 1996
National Alliance of Business

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CONTENTS

INTRODUCTION 1

HOW TO USE THE PRODUCT CHECKLIST 3

CHECKLIST 5

- Step 1: Program Development 5
- Step 2: Program Preparation 6
- Step 3: Curriculum Development 7
- Step 4: Instructional Development 8
- Step 5: Training Staff Preparation 9
- Step 6: Program Delivery 10
- Step 7: Training and Program Evaluation 11

COMPARISON CHART 13

THIS CHECKLIST IN CONTEXT 15

ADVISORY GROUPS 17

INTRODUCTION

PURPOSE OF THE EMPLOYEE TRAINING PRODUCT CHECKLIST

The Employee Training Product Checklist will help you, as a business person or labor representative, to review potential training products to get the most value from your training investment. It can be used to determine whether a particular training product — such as a curriculum or computer-based training program — follows best practice and will meet the needs of your firm and build the productive capacity of its employees. The Checklist can be used to assess the quality of a variety of employee training products, such as the following:

- Training development guidebooks,
- Curricula,
- Training workbooks,
- Computer-based training programs, or
- Training video or audio cassettes.

The Checklist was designed for use with *technical* training products, but it is also relevant for training products in other areas, such as basic skills,[1] management, work restructuring, or sales.

The training products you review may cover only a portion of the components you need to implement a successful employee training program. Therefore, this checklist also helps you to assess your firm's own capacity to undertake the various employee training program components and successfully integrate the training product you ultimately select into your company practices.

EMPLOYEE TRAINING

The Checklist was developed from a list of Employee Training Best Practice Guidelines, constructed by nationally recognized training professionals, business people, and union representatives. These individuals defined employee training as the following:

> *Employee training* supports adaptive, productive workplaces that capitalize on investments in both technology and workforce skills to boost productivity. Employee training is firm-focused and is a key element of a firm's overall performance improvement plan. Training assists a firm to achieve
>
> - Effective utilization of technology resources;

[1] A separate *Workplace Literacy Product Checklist* is available from the National Workforce Assistance Collaborative and the National Alliance of Business.

- Decentralized decision making;
- Improved work processes by measurably improving worker knowledge, skills, and ability; and
- Full customer satisfaction and profitability.

Training links technical, occupation-specific skills development with broad-based foundational skills such as teamwork, problem solving, leadership and initiative, resource allocation, customer service, communications, and commitment to lifelong learning to meet the requirements of today's and tomorrow's workplace. In large companies, employee training is often provided by internal staff; in small and mid-sized companies, training is usually provided by a third-party supplier.

PRODUCT CHECKLIST STRUCTURE

The Checklist is divided into six sections:

1. *Introduction* — Explains the purpose of the Checklist, defines employee training, and lays out the structure of the Checklist.
2. *How to Use the Product Checklist* — Provides instructions for using the Checklist.
3. *Checklist* – Provides an annotated listing of the key elements in each of seven steps in the development and implementation of an employee training program, which you can use to measure and evaluate various training products.
4. *Comparison Chart* — Provides space for you to compare the merits of three different products, along with your firm's own capacity to undertake parts of an employee training program.
5. *This Checklist in Context* — Explains how employee training fits within the larger context of workforce and workplace change and lists other Collaborative products designed to help small and mid-sized companies in their change efforts.
6. *Advisory Groups* — Lists the individuals serving on the Collaborative's Advisory Board and Councils.

How To Use The PRODUCT CHECKLIST

This Checklist divides the development and implementation of an employee training program into the following seven steps:

1. *Program Development* — Tying training to company business objectives.

2. *Program Preparation* — Determining the knowledge and skill needs in your workplace.

3. *Curriculum Development* — Creating a curriculum that reflects workplace requirements and bridges the gap between the knowledge, skills, and abilities needed in your workplace and employees' current knowledge and skill levels.

4. *Instructional Development* — Adapting training methods to the workplace and employees.

5. *Training Staff Preparation* — Ensuring that training staff members are highly qualified.

6. *Program Delivery* — Tailoring training to employees' needs.

7. *Training and Program Evaluation* — Evaluating to ensure training quality.

Then for each step, the Checklist asks a series of questions about whether a product contains specific "quality elements."

To use the Checklist, compare the products you are considering purchasing with the quality elements listed for each of the seven steps. (The questions in the Checklist vary slightly depending on whether the product you are evaluating is "ready-to-use" or serves as a "how-to guide.")

The products you review may not cover all seven steps. On the one hand, a training development guidebook would probably provide instructions on all seven steps. On the other hand, some training curricula may cover program preparation, curriculum development, instructional development, and program delivery, while other curricula may cover only curriculum and instructional development.

All seven of the steps are important parts of an employee training program, and each must be accomplished if the program is to be completely successful. However, individual employee training products do not need to address each step. In cases where the product you are reviewing does not encompass a particular step, your firm should be prepared to undertake that step itself to successfully integrate the training product into your company practices.

The ideal training product would contain all of the quality elements listed in the Checklist that your firm is not prepared to undertake itself. However, you will probably find that the different products you review will vary in the number of elements they contain, possess differing strengths and

weaknesses, and have relatively divergent costs. In the end, you will need to use your own set of criteria to select from among the products you review. Factors to consider include these:

- The number of elements the products contain,
- The relative value you place on the elements the products either do or do not contain,
- Your ability to use other methods to address any of the elements not contained in a product, and
- The cost of the products — compared with each other and with your budget for employee training.

You can use the Comparison Chart at the back of this Checklist to summarize the results of the reviews you conduct. The Comparison Chart also has space to indicate any key elements missing from the products that your firm has the capacity to provide. By using the Comparison Chart, you will be able to compare the products you are reviewing with each other and with your firm's own capabilities to determine the best product to purchase.

CHECKLIST

— Feel free to make copies of the Checklist —

Instructions: Check the boxes next to questions that you can answer positively.

For a ready-to-use product — one that you can immediately use in your company, with no development or adaptation required on your part — read only the part of each question before the parentheses, for example,

Does the product . . .

For a how-to guide — a product that provides you with instructions in doing something — read all of the question, including the parts in parentheses, for example,

Does the product (provide instruction on how to) . . .

STEP 1: Program Development — Tying training to company business objectives.

Does the product (provide instruction on how to) —

❑ **Align training with company objectives and culture?**

Training objectives should reflect the company's overall performance objectives and corporate culture.

❑ **Involve key players?**

Management, supervisors, employees, and, in unionized workplaces, union representatives must buy in to any training program.

STEP 2: Program Preparation — Determining the knowledge and skill needs in your workplace.

Does the product (provide instruction on how to) —

❑ **Determine workplace knowledge and skill needs?**

The product should help you to determine the following:

- The occupational knowledge and skill requirements, which should be linked to industry skill requirements where these exist.
- The academic or foundational knowledge, skills, and behavior that underlie the occupational skill requirements.
- The knowledge and skill requirements needed to support forms of work organization that emphasize broadening worker knowledge and skills and empowering employees.
- The knowledge and skills needed to transfer new learning to different work settings.

❑ **Provide, select, or develop appropriate assessments?**

The product should provide, select, or develop assessments that are valid for training purposes and reliable indicators of job performance.

❑ **Assess potential trainees?**

The product should help you to assess the target population's job-related knowledge, skills, and abilities.

STEP 3: Curriculum Development — Creating a curriculum that reflects workplace requirements and bridges the gap between the knowledge, skills, and abilities needed in your workplace and employees' current knowledge and skill levels.

Does the product provide (instruction on how to develop) a curriculum that —

❑ **Bridges the knowledge/skill gap?**

The curriculum should bring the target population's knowledge, skills, and abilities to the level required for their work.

❑ **Matches the company environment?**

The curriculum should match the company's organizational structure, work processes, and culture.

❑ **Incorporates company processes?**

The curriculum should incorporate and draw on company work processes, tasks, and materials.

❑ **Allows trainees to solve job problems?**

The curriculum should provide opportunities for employees to use the knowledge, skills, and abilities they are gaining to solve problems commonly encountered on the job.

❑ **Links training with other workforce and workplace development efforts?**

Where appropriate, the curriculum should be linked or integrated with such other workforce and workplace development efforts as workplace literacy training and work restructuring efforts.

STEP 4: Instructional Development — Adapting training methods to the workplace and employees.

Does the product provide (instruction on how to develop) training activities that —

❑ **Match employee needs?**

Instructional methods, media, and technology should match the training objectives and learning styles of individual students.

❑ **Use company equipment and materials?**

Training activities should use company technology, equipment, and materials comparable to that used on the job.

❑ **Are "hands on"?**

Training activities should provide employees with opportunities to apply and practice the knowledge and skills they are gaining in the workplace or a "workplace-like" setting.

❑ **Can be adapted to the workplace?**

Training activities should follow a flexible format which can be adapted to workplace schedules.

❑ **Allow for self-paced instruction?**

Training activities should include self-paced training modules.

❑ **Deliver instruction "just in time"?**

Training activities should provide instruction as employees need new skills on the job.

STEP 5: Training Staff Preparation — Ensuring that training staff members are highly qualified.

Does the product (provide instruction on how to) —

❑ **Train staff in the principles of adult learning?**

Staff need to understand the basic principles of adult learning and their application to instructional design and delivery.

❑ **Train staff on job requirements?**

Staff need to understand job performance requirements and the industry environment.

STEP 6: Program Delivery — Tailoring training to employees' needs.

Does the product (provide instruction on how to) —

❑ **Explain the training program to employees?**

The product should educate employees about expected performance outcomes and assessment methods.

❑ **Assess employees' needs and customize training plans?**

The product should assess each individual's knowledge and skill development needs — defined by his or her own knowledge and skill levels and training goals — and tailor each individual's learning plan accordingly.

❑ **Provide trainees with feedback?**

The product should provide trainees with regular, ongoing feedback concerning their progress while in the training program.

❑ **Help employees to apply their new knowledge, skills, and abilities to their jobs?**

The product should help employees, during and after the training program, to apply their newly acquired knowledge, skills, and abilities to their jobs.

❑ **Prepare supervisors to reinforce training on the job.**

The product should prepare trainees' direct supervisors to reinforce the training and help their employees transfer their new knowledge and skills to their jobs.

❑ **Provide a "portable credential"?**

The product should provide a portable credential for employees who complete training successfully.

❑ **Promote on-going learning?**

The product should build worker understanding that learning is an integral and on-going component of successful work performance.

STEP 7: Training and Program Evaluation — Evaluating to ensure training quality.

Does the product (provide instruction on how to) —

❑ **Involve key players in evaluating the program?**

Management, supervisors, employees, and, in unionized workplaces, union representatives need to be involved in evaluating program effectiveness and its responsiveness to their needs.

❑ **Provide, select, or develop multiple evaluation measures?**

The product should provide, select, or develop evaluations to measure both performance outcomes and the quality and effectiveness of the training process.

❑ **Ascertain individuals' learning gains?**

The product should assess individuals' learning gains and overall program performance.

❑ **Conduct evaluations regularly?**

The product should conduct evaluations regularly to ensure that the training program remains on track.

COMPARISON CHART

— Feel free to make copies of the Comparison Chart —

Instructions: Put the names of the products you reviewed in the blank boxes across the top of the Chart. Copy the Checklist results for each product to this Chart, add up the number of elements contained in each product, and note the products' costs. In the last column, check the elements that your firm will be able to undertake to successfully integrate the training product into your company practices. In comparing products, do not rely solely on the total number of elements covered by each product. Be sure to compare which elements the products do and do not cover, whether your firm is capable of undertaking the missing quality elements, and what product costs are.

STEPS AND ELEMENTS IN AN EMPLOYEE TRAINING PROGRAM				Your Firm
1. Program Development				
- Aligns training with company objectives and culture.				
- Involves key players.				
2. Program Preparation				
- Determines workplace knowledge and skill needs.				
- Provides, selects, or develops appropriate assessments.				
- Assesses potential trainees.				
3. Curriculum Development				
- Bridges the knowledge/skills gap.				
- Matches the company environment.				
- Incorporates company processes.				
- Provides opportunities to solve job problems.				
- Links training with other workforce and workplace development efforts.				

4. Instructional Development				
- Matches employee needs.				
- Uses company equipment and materials.				
- Provides "hands-on" training activities.				
- Adapts to workplace schedules.				
- Allows for self-paced instruction.				
- Delivers instruction "just in time."				
5. Training Staff Preparation				
- Trains staff in the principles of adult learning.				
- Trains staff on job requirements.				
6. Program Delivery				
- Explains the training program to employees.				
- Assesses employees' needs and customizes training plans.				
- Provides trainees with feedback.				
- Helps employees to apply their new knowledge, skills, and abilities to their jobs.				
- Prepares supervisors to reinforce training on the job.				
- Provides a "portable credential."				
- Promotes on-going learning.				
7. Training and Program Evaluation				
- Involves key players in evaluating the program.				
- Provides, selects, or develops multiple evaluation measures.				
- Ascertains individuals' learning gains.				
- Conducts evaluations regularly.				
TOTAL NUMBER OF ELEMENTS				
COST				

19

This CHECKLIST IN CONTEXT

Employee training is just one of a number of workforce and workplace changes companies must undertake to remain competitive in today's global economy. For many companies, staying profitable involves adopting new technologies, restructuring work processes, and redefining the relationship between employers and employees, as well as upgrading employees' knowledge, skills, and abilities.

All of these changes are interrelated. New machines frequently require new work processes if they are to be fully used. New work processes can lead to changes in the locus of decision making and redefining the roles of both labor and management. Training in a variety of skills, including basic reading, writing, and mathematics, is almost always necessary to put any other changes into place successfully.

The National Workforce Assistance Collaborative has prepared a series of tools to help small and mid-sized companies find and select the high quality service providers and products they need to undertake successful workforce and workplace changes, including the following:

- *Employee Training Interview Guide: Judging the Quality and Effectiveness of Training Providers*
- *Employee Training Product Checklist: Judging the Quality of Training Products*
- *Labor-Management Interview Guide: Judging the Quality and Effectiveness of Labor-Management Relations Consultants*
- *Resource Guide: A Key to Organizations Working in Employee Training, Labor-Management Relations, Work Restructuring, and Workplace Literacy*
- *Work Restructuring Interview Guide: Judging the Quality and Effectiveness of Work Restructuring Consultants*
- *Workplace Literacy Interview Guide: Judging the Quality and Effectiveness of Literacy Providers*
- *Workplace Literacy Product Checklist: Judging the Quality of Workplace Literacy Products*

Additional Collaborative publications designed for small and mid-sized businesses and the service providers working with them include these:

Resource Listings

- *Workplace Literacy Publications: An Annotated Bibliography of Print Resources* — A workplace literacy bibliography.

Newsletters

- *Workforce Briefs* — A newsletter series for businesses.
- *Business Assistance Notes* — A newsletter series for service providers.

Tools for Companies

- *Pay-for-Knowledge* — A how-to guide on the development and implementation of a pay-for-knowledge system.
- *Computer-Based Training* — A guide for selecting computer-based training products and services.

Tools for Service Providers

- *Integrated Service Delivery* — A publication providing insights into the best methods for delivering integrated services to small and mid-sized companies.
- *Delivering Cost-Effective Services to Small and Mid-Sized Companies* — A publication highlighting proven approaches for delivering cost-effective services to small and mid-sized companies.
- *Approaches to Forming a Learning Consortium: A Guide for Service Providers* — A how-to guide on forming learning consortia.
- *Marketing to Businesses* — Information on how to identify and effectively market services to a local business community.
- *Assessing an Organization's Training Needs* — A generic training needs assessment accompanied by instructions on how to approach and "market" the value of training to small and mid-sized business leaders.
- *Assessing the Value of Workforce Training* — An introduction to assessing the value of training programs, focusing on quick and easy strategies.

Internet Services

- *Internet Listserv* – An electronic forum for discussing workforce and workplace development issues. To subscribe to NWAC-L, send an e-mail message to LISTSERV@PSUVM.PSU.EDU saying "subscribe NWAC-L [YourFirstName YourLastName]."
- *Gopher Server* – Online access to materials and products produced by the Collaborative. The gopher server address is INFO.PSU.EDU. Open "Information Servers at Penn State"; then open "Research Centers and Institutes."
- *World Wide Web Home Page* – Information on the Collaborative and its products and services, as well as links to related information on the Internet (http://www.psu.edu/institutes/nwac).

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